Packaging and meat-alternative lovers: How an eye for detail is shaping purchase behaviour in Europe

amcor

INTRODUCTION

New research carried out by Amcor investigates how European consumer attitudes and expectations towards meat alternatives are changing.

Almost 60% of meat alternative consumers are consuming them **every week**

1 third consume them **several times a week**

Recent research by the Smart Protein project also found that the European plant-based food sector has grown by 49% in the last two years, with a total turnover of €3.6 billion.

There is an opportunity here: consumers don't automatically turn to known brands for these products - be they new/start-up or established. With the right packaging, brands can capture consumer attention.

RESEARCH METHODOLOGY

Countries:
Germany, France, UK, Italy, The Netherlands

Respondents:
~200 per country

Questions: 14

Target Filter:
We only questioned consumers who have purchased a meat alternative in the past year.

The survey was translated into the official language of each country.

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INSIGHT 1

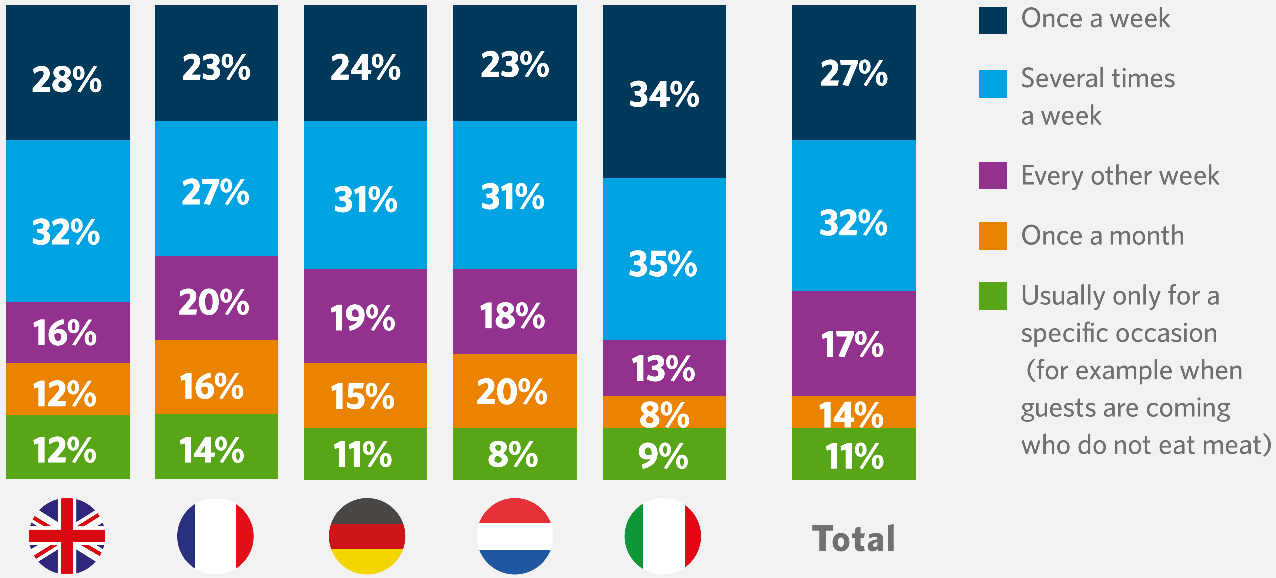
THE PANDEMIC MADE CONSUMERS RECONSIDER THEIR DIET

The pandemic made many shoppers think twice about where their food comes from, increasing demand for products that are perceived to support immune systems and reduce environmental impact. This might explain why 50% of Europeans are consuming less meat since the covid-19 outbreak.

- Italy had the highest percentage of consumers (43%) eating more meat alternatives during the pandemic
- The UK leads in the number of consumers who stopped eating meat altogether during the pandemic, with about 12% indicating this change in their eating habits

Almost 60% of consumers who prefer plant based products are consuming meat alternatives every week, with one in three opting to do the same several times a week

How often do you consume meat alternatives?



- French consumers are mixed in their changes. More than half of French shoppers are consuming less meat (53%), but the country was also leading on the other side in percentage of consumers who ate more meat (15%) during the pandemic
- 80% of consumers across Europe have changed the way they consume meat or meat alternatives since the pandemic

INSIGHT 1

THE PANDEMIC MADE CONSUMERS RECONSIDER THEIR DIET

With many European consumers keen to support local suppliers and play their part in protecting the planet, brands have an opportunity to innovate products and packaging that emphasizes local sourcing and natural ingredients. Clear, detailed labelling that gives consumers peace of mind is no longer an add-on or an afterthought. It is a vital component of the overall packaging concept.

Two motivators behind purchasing meat alternatives are diet and animal welfare. 25% of shoppers across the UK, Netherlands, Germany, France, and Italy said that animal welfare was the primary reason for buying meat alternatives - with diet following closely behind.

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The only exceptions to this trend are Italy and the Netherlands. 42% of Italian shoppers purchase meat alternatives because of diet, compared to 17% who do so because of animal welfare. In the Netherlands, the desire to protect the planet is the second biggest consideration.

INSIGHT 2

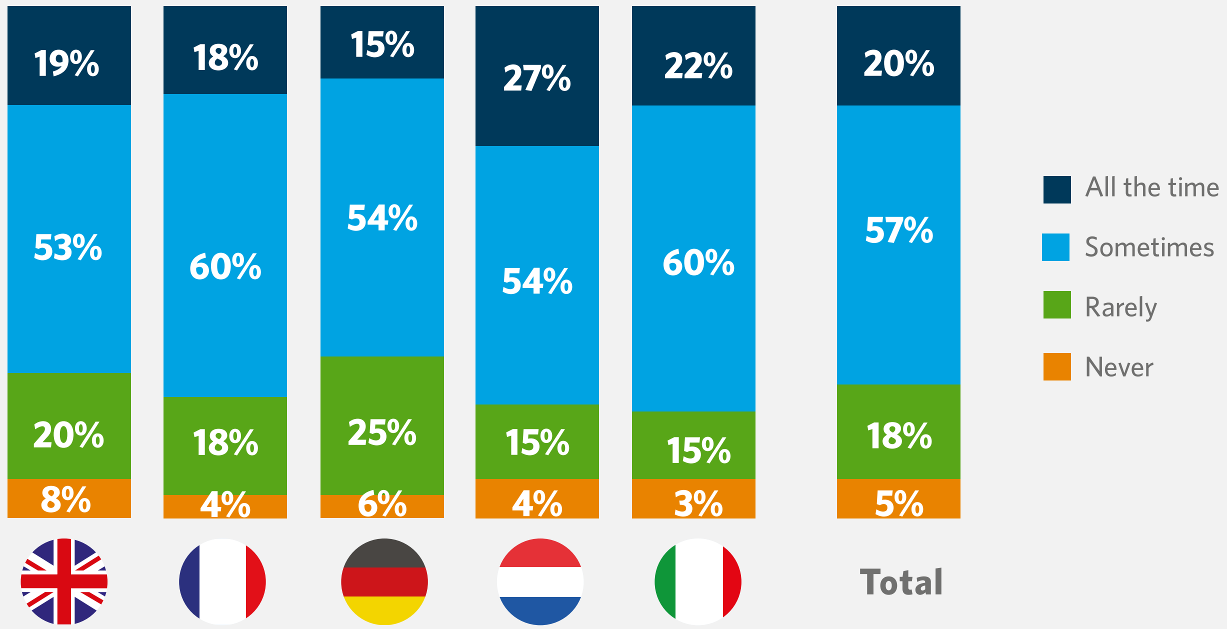
MEAT-FREE CONSUMERS WANT DETAILED INFORMATION

The European meat alternatives market is expected to grow at a CAGR of 28.67% from 2020-2027. Every year, consumers have more meat alternative products to choose from and with such mainstream accessibility to alternative proteins, brands will need to work harder to be seen.

With the right packaging design, brands have a captive audience. 20% of meat alternative consumers are paying close attention to packaging - they're looking for product details (about the benefits and nutritional value of the product), a transparent window through which to clearly see the product itself, and sustainability credentials.

About 1/5 meat alternative consumers are constantly paying attention to the packaging while only a small minority say they never pay attention. About 3 in 4 are considering packaging more often than not

Do you consider the packaging when you buy meat alternatives?



INSIGHT 2

MEAT-FREE CONSUMERS WANT DETAILED INFORMATION

Despite this, Nielsen found that 39% of products that support a plant-based diet do not specify being clean, simple, sustainable or free from artificial ingredients on their product labels. This is a missed opportunity. Packaging can support education about plant-based meat alternatives by presenting detailed information about why and how products best fit the lifestyle and health aspirations of consumers.

This is particularly true with the rise of the “immunity consumer” - someone actively shopping for food that boosts their immune system. Previously, they might have looked to vitamin pills and nutritional supplements to meet this need. Now, they’re looking for immune-boosting ingredients included within mainstream products.

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of products that support a plant-based diet do not specify being **clean, simple, sustainable** or **free from artificial ingredients** on their product labels.

MAXQ

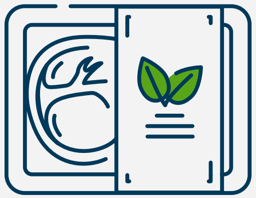
Post-pandemic, European shoppers desire transparency. They want brands they can trust to provide credible, safe products. One way brands can achieve this is with smart packaging, like MaxQ.

MaXQ is an end-to-end digital packaging system designed to grow consumer engagement and loyalty. A single scan lets consumers view complete product information, benefit from updated promotions or even have a live conversation with the brand.

INSIGHT 3

SEEING THE GOODS

89% of meat alternative consumers believe that the visibility of the product itself is the most important criteria when it comes to meat alternative packaging. This may be because they are less familiar with alternative proteins and so want to 'see what they're getting'.



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Historically, meat alternative brands used traditional, natural-looking packaging featuring green and brown tones to appeal to health-conscious animal lovers. But to have mainstream appeal in 2021 and beyond, brands are changing up their packaging to attract consumers beyond the vegan audience. Not only are they adopting more meaty visuals but they're mimicking meat's transparent packaging and absorbent pads.

Transparent packaging is a great way for brands to convince shoppers to buy as it shows off the appearance and texture of the food - important for all consumers, but particularly those who like the flavor and texture of meat but want to reduce their consumption. Amcor's SkinTite™ second skin film is an ideal solution for meat alternative brands as it fits tightly around the product for unrivalled presentation.

Marks and Spencer's vegan range "Plant Kitchen" uses packaging with large transparent windows, to give consumers a good preview of the food inside.

INSIGHT 3

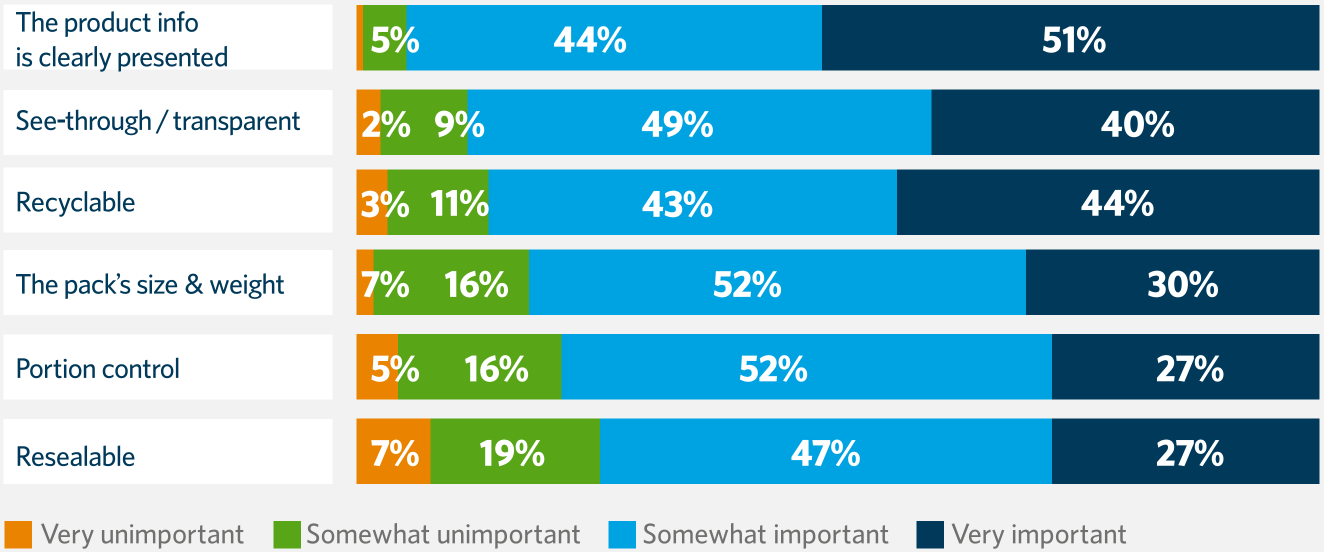
SEEING THE GOODS

Another example is from challenger brand “This” which designed its packaging to appeal to those who still eat meat but want to reduce their consumption. Their imagery captures the look and feel of chicken, bacon, and steak and brand language is non-judgemental about overall eating habits.

An added benefit of using packaging like Amcor’s EZ Peel® Reseal™, which provides visibility of the product inside, is the easy-to-open and reclosable PET sealing. This feature enables freshness, longer shelf life and less food waste, providing both consumer convenience and environmental benefits.

Seeing product info, seeing the product itself and recylability are voted in most often by meat alternative consumers

How important are each of the following features for meat alternative packaging?



44%

of European consumers say recyclability is **'very important'**

- 95% of meat alternative consumers want to be able to understand the product with information clearly stated on-pack

INSIGHT 4

CONSUMERS ARE WILLING TO PAY FOR SUSTAINABILITY

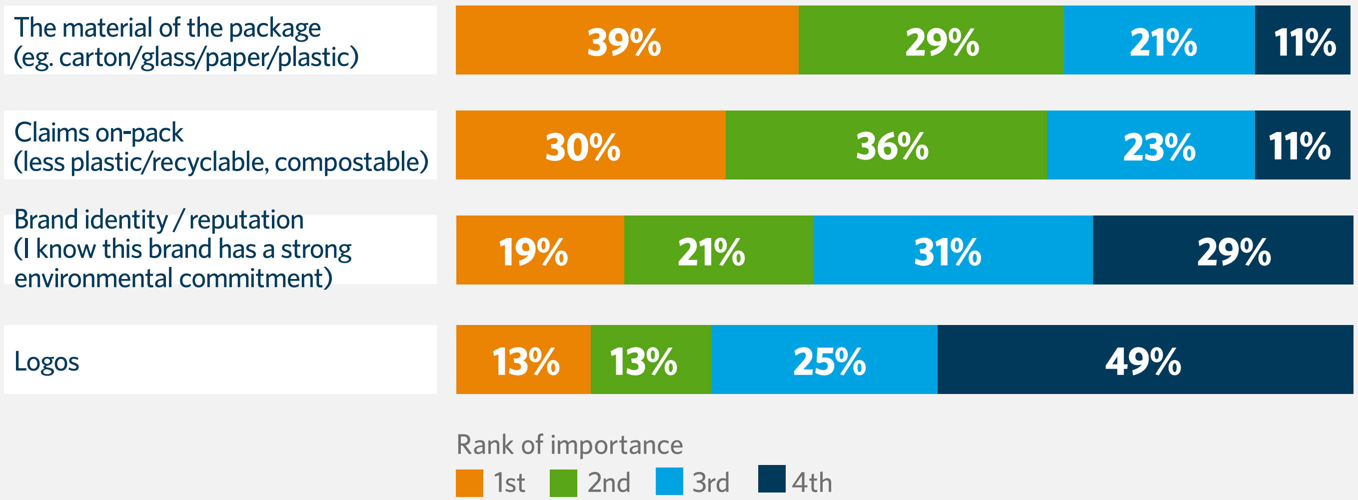
More than ¾ of European consumers of meat alternatives are willing to accept a price increase for more sustainable packaging, with 72% saying they are willing to pay 5% more.

However, shoppers need guidance and education around sustainability. ⅔ of consumers are looking for clues to determine packaging sustainability, with the majority focusing on the material of the package and on-pack claims to figure this out.

Almost **30%** of consumers put most value in **recyclability**, and **25% are looking for less plastic**

Meat alternative consumers use material of the package and claims on the pack most often as clues to determine how sustainable it is

When you're buying meat or meat alternatives, how do you identify a sustainable packaging type? Please rank in order from 1 to 4: 1 being most important to 4 least important



- 33% of European consumers said they don't pay attention to sustainability at all
- 2 out of 3 consumers are looking for sustainability clues to help them determine what is sustainable

In terms of the specific labelling used, the terms "recyclable" and "less plastic" resonate the most with meat alternative consumers. Almost 30% of consumers put the most value in recyclability, and 25% are looking for less plastic.

INSIGHT 4

CONSUMERS ARE WILLING TO PAY FOR SUSTAINABILITY

With consumers saying they are willing to pay more for more sustainable packaging, meat alternatives brands can be vocal about their environmental credentials, from the source of the food right down to the sustainability of the packaging. However, on-pack claims and sustainability symbols should be clear to help consumers make educated purchases and avoid confusion.

SKINNOVA™

SkinNova™ is a more sustainable skin packaging that reduces plastic waste by 70%*. Compared to conventional MAP packaging materials, SkinNova™ reduces carbon footprint by 45%. *Compared to a conventional MAP pack with 600 um APET + 62 um PET/PE/EVOH/PE

Some helpful tips for on-pack sustainability claims

Do	Don't
Use **easy to understand**, specific, simple language. Make it clear what the claim is for. (i.e. is the claim about the packaging or the product inside?)	**Don't make vague claims** that imply a product is environmentally beneficial.
Make claims that are **accurate**, specific, verifiable and relevant.	
Be ready to prove your claims and provide scientific **evidence** if requested.	**Don't make claims you cannot validate.**
Have a **3rd party evaluation** done to back up your claim (i.e. cyclos-HTP).	**Don't withhold proof** if requested. Scientific evidence can't be withheld on the grounds that it's company confidential.
Take into consideration **all relevant aspects of the lifecycle** of the product.	**Don't highlight one positive attribute** while hiding a trade-off somewhere else (i.e. touting new recyclable packaging but hiding a significantly larger carbon footprint).
	Avoid a recycling percentage. '100% recyclable' is nearly impossible to prove because the exact material from that pack isn't tracked through the recycling system. Zero material loss cannot be guaranteed or measured.

INSIGHT 4

CONSUMERS ARE WILLING TO PAY FOR SUSTAINABILITY

PACKPYRUS

Packpyrus uses a lightweight, thermoformable paper-based tray that delivers a 52% reduction in non-renewable primary energy and a 56% reduction in carbon footprint compared to traditional plastic APET/PE trays.

ASSET

Life Cycle Analysis – which calculates the environmental impact of a product from raw material to end-of-use – can help brands compare packaging options to identify solutions with a lower carbon footprint, as well as lower water and energy consumption.

INSIGHT 5

BRANDS HAVE AN OPPORTUNITY TO BE THE MARKET LEADER

With European shoppers increasingly incorporating meat alternatives into their diet, there is a big opportunity for brands to provide options to their customers

Until recently, the relatively new market for meat alternatives was dominated by start-ups like Beyond Meat and Impossible Foods. However, an increasing number of other companies are providing alternatives to the alternatives. This is exciting for brands of all sizes - legacy and emerging alike - who have huge potential to stand out on-shelf and capture consumer attention with packaging that protects the sustainability and health benefits of products.

CONCLUSION

This report shows that European meat alternative consumers care about how healthy and sustainable products are – and are prepared to pay for a more sustainable choice. Here are three key takeaways for meat alternative brands to win in this growing and increasingly competitive market:

- Use **transparent packaging** to give consumers a clear view of the texture and quality of the product inside
- Provide explicit **guidance and education** about the sustainability credentials of packaging
- Using the terms “**recyclable**” and “**less plastic**” on packaging resonates most with meat alternative consumers.

FIND OUT MORE

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